Broadcasting Aug 19

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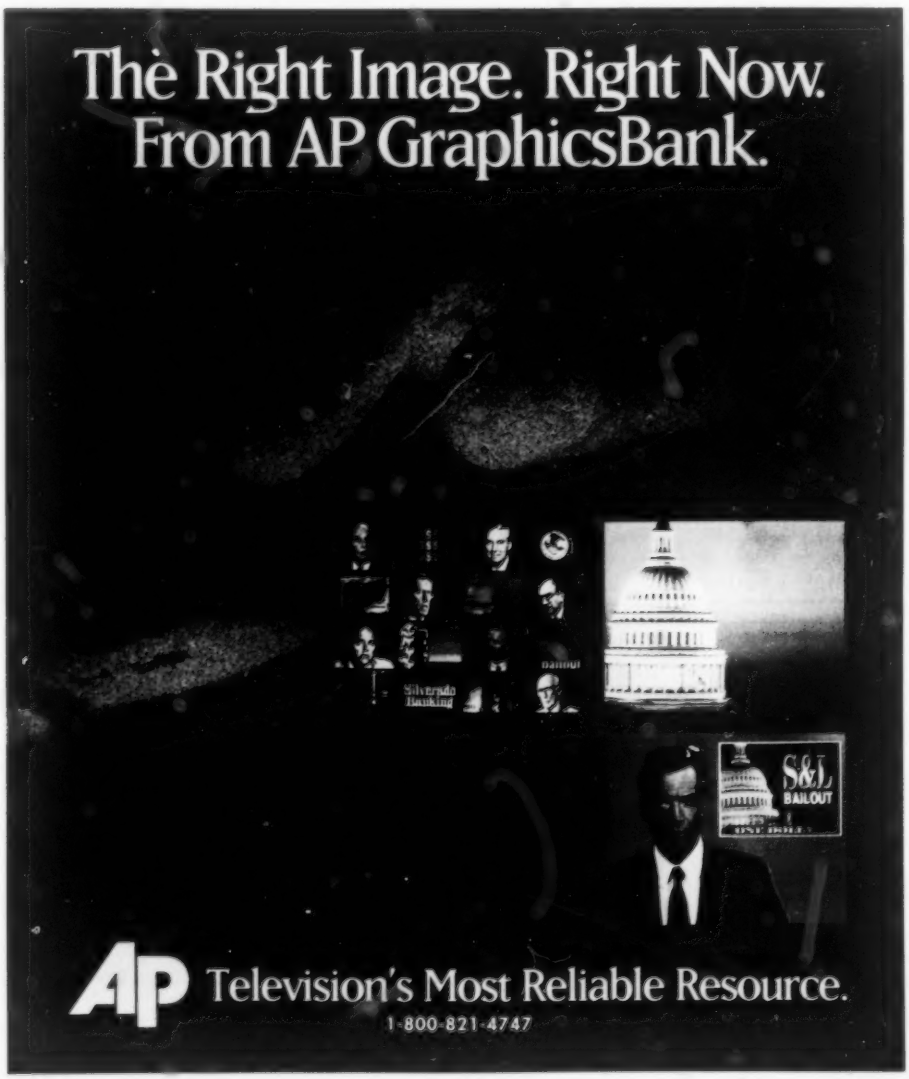
TELEVISION / 34
P.O.V. yanks film on Catholic Church; making the most of more news

RADIO / 27
Consumer electronics manufacturers ready to roll out AMAX 'super radio'

BUSINESS / 41
ABC-TV affiliates protest network's plan to cut compensation

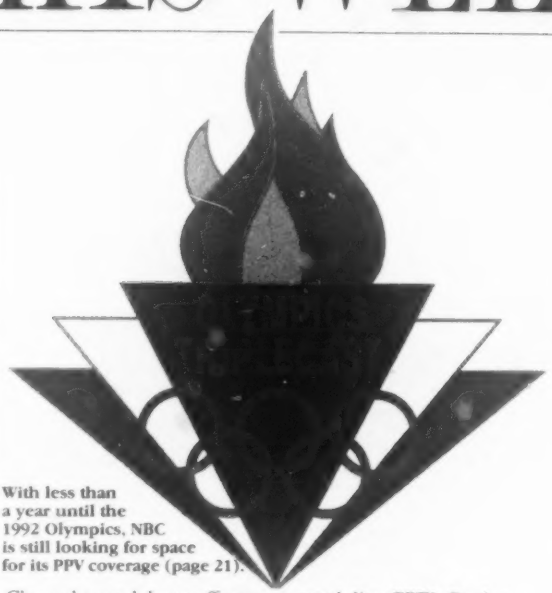
JOURNALISM / 50
TV stations show little interest in experimental coverage of federal courts



Vol. 121 No. 8 $2.50

Television, cable, telcos: What are they worth?

THIS WEEK



With less than a year until the 1992 Olympics, NBC is still looking for space for its PPV coverage (page 21).

19 / INDUSTRY REVENUES

Lower station prices are the chief contributors to a one-third drop in broadcasting industry valuations compared with several years ago. Current figures put industry valuation net of debt at $29.5 billion. On the cable side, the cash flow valuation of systems, with debt subtracted, is pegged at $44 billion; network valuation is estimated at $8 billion. Telcos have gained: estimates of net asset value, based on cash flow multiples, range from $275 billion to $330 billion.

20 / NO RELIEF FOR SCATTER MARKET

Projections are for fourth-quarter scatter market ad prices to repeat last year's poor performance, when sales were off 20%-40%. Sales to buyers who passed on upfront bargains, hoping for better deals in the fall, could give the market a boost. Syndicators, who had disappointing upfront sales, will be participating in the scatter market for the first time in recent history, and may face tough competition from the networks.

21 / HURDLES FOR TRIPLECAST OLYMPICS

With the Summer Olympics less than a year away, NBC is still looking for channel space for its three-channel, pay-per-view coverage. C-SPAN, Discovery and the Family Channel turned down offers for their space, leaving NBC with just partial use of Request TV and Viewer's Choice, plus space it can plumb from combining its own CNBC and American Movie Classics into one channel. The lack of a national channel solution, leaving individual systems to find their own ways, would make it tough for the PPV plan to reach its household goal of 40 million.

22 / SCHEDULES FOR TOP 3 MARKETS

BROADCASTING has assembled schedules for fall syndicated programing in New York, Los Angeles and Chicago, and the show to watch, say station, agency and programing executives, is Columbia Pictures Television's *Married... with Children*, slotted at 7 p.m. in New York and Los Angeles and 6:30 p.m. in Chicago. *Married...* is marketed as the first off-network series exempt from the prime time access rule. Also on the watch list: CPT's *Ruckus* comedy game show.

25 / FULL FUNDING REQUESTED FOR FCC

House Energy and Commerce Committee Chairman John Dingell has asked the Appropriations Committee to make full funding for the FCC a priority in the upcoming House-Senate conference. The House authorization bill includes $133 million for the commission, compared with $126.2 million expected to come out of the Senate. Yet to be worked out is user-fee funding: the House bill would pull $65 million of its total from fees on licensees; in the Senate, Commerce Committee Chairman Ernest Hollings is on record opposing the fees.

27 / AM TO THE MAX

Consumer electronic manufacturers are ready to roll out the NAB-commissioned AMAX radio, which is designed to dramatically improve the quality of AM sound. Enhanced features like a minimum frequency response of 6.5 khz for car receivers and 7.5 khz for home, automatic bandwidth control and AM noise blanking should, broadcasters hope, give the medium a competitive chance against FM. The unveiling is scheduled for the Radio '91 convention next month, and 1,100 stations have told the NAB they will air promotional spots in a year-long campaign.

34 / FULL STOP TO 'STOP THE CHURCH'

Stop the Church, a 23-minute documentary on a gay-rights protest aimed at the Catholic Church, has been pulled from the PBS *P.O.V.* series because of what the network called the "inappropriateness of ridiculing individuals and groups." Coming on the heels of the *Tongues Untied* uproar, which ensued after PBS's airing of that documentary on black homosexuals, producers and program suppliers see a tense, timid time descending on the network. PBS, however, maintains the decision was made after an internal review and not in response to outside forces.

35 / ALL THE NEWS THAT SELLS

Faced with impending cuts in their affiliate compensation and forgone ad inventory to syndicators, some major-market stations are looking to

increase revenue by expanding their morning and prime time news operations. WSVN(TV) Miami, for example, which in 1989 dropped its NBC affiliation in favor of quasi-independent affiliation with Fox, has had substantial ratings success (22 share) with a 7-9 a.m. newscast. But expansion means money: Disney spent $40 million to start KCAL(TV) Los Angeles's 8-11 p.m. operation, and annual operating costs are $8 million-$10 million.

38 / OPEN ALL NIGHT

Two proposed 24-hour infomercial services have cable operators wondering whether the potential revenue will be worth the channels. The first, Home Shopping Network's Infonet, is scheduled for launch Sept. 1, and will be available for broadcasters and cable operators to access it anytime 24 hours a day or as a full-time dedicated channel. The second, FYI-The Consumer Channel, is still on the drawing board: its principals are looking at celebrity-hosted magazine shows, wrapping together 5- or 10-minute infomercials on compatible products. Participating cable systems would get a cut of the revenues.

41 / ABC CUTS COMPENSATION 10%

ABC announced a package of affiliate compensation cuts, totaling $11 million, that are designed to boost network profits in what has been called a particularly bad year. Included in the deal: cutting the hourly rate for *World News Tonight*, tying each station's hourly rate to its delivery of prime time households and reallocating daytime percentages to encourage clearances of *Home* and *Loving*. ABC said the revenue potential outweighed the risk that affiliates might become more inclined to pre-empt less-popular programs.

46 / APPEALS OF TELCO DECISION

Appeals are piling in on Judge Harold Greene's decision, stayed pending appeals court review, to let the regional Bell operating companies (RBOC's) enter the information services business. The RBOC's, after failing to convince Judge Greene to lift the stay, are likely to go directly to the appeals court; opponents of the decision, headed by the American National Newspaper Association, will ask this week that the appeals court reverse. The conflicting appeals are expected to keep the case tied up for months.

47 / FINDER'S WEEPERS

The NAB joined a number of broadcasters in petitioning the FCC for a "finder's preference," that is, favorable consideration to the license applicant who finds a nonallocated frequency. Sentiment for the idea is growing at the FCC; Commissioner James Quello said, "I think it's unfair for someone to...pay to find a frequency, and then get filed on by 10 or 15 applicants." However, staff members questioned the commission's legal authority to alter the policy.

47 / PAC-ING THEIR POLITICAL WAR CHESTS

Cablecasters beat broadcasters $175,000 to $116,000 in PAC contributions to House and Senate campaigns for the first six months of 1991. Senate Communications Subcommittee Chairman Daniel Inouye (D-Hawaii), up for re-election in '92, topped the congressional contribution list with $10,000 from each PAC.

Calling the content 'inappropriate,' PBS and the 'P.O.V.' program pull the 'Stop the Church' segment (page 34).

50 / FEW ORDERS IN THE COURT

Since the federal courts opened civil trials to TV on an experimental basis July 1, few television and radio stations have jumped at the opportunity for coverage. The reason, broadcasters say, is that the trials have not produced particularly newsworthy events. RTNDA President David Bartlett blames the lukewarm response not on lack of interest but on the demands of normal daily news flow. He worries, however, that a perceived media apathy could hurt chances for the test becoming permanent.

52 / COMPRESSION TESTS

Cablevision Systems last week tested General Instruments' DigiCable and DigiSat compression hardware, and plans more tests next month. Cable Laboratories was expected to issue requests for proposals to 65 companies for developing compression systems.

INDEX

Business....41
Cable....38
Changing Hands....43
Classified Advertising....59
Closed Circuit....6
Datebook....15
Editorials....74
Fates & Fortunes....66
Fifth Estater....71
Focus on Finance....44
For the Record....53
In Brief....72
Journalism....50
Masthead....17
Monday Memo....17
Open Mike....16
Programing....34
Radio....27
Ratings Roundup....37
Riding Gain....30
Satellite....51
Syndication Marketplace....36
Technology....52
Top of the Week....19
Washington....46
Washington Watch....49

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Broadcasting

Founder and Editor
Sol Taishoff (1904-1982)

1705 DeSales Street, N.W., Washington, D.C. 20036
Phone 202-659-2340
Editorial Fax: 202-429-0651 ☐ Administrative Fax: 202-331-1732 ☐ Advertising Fax: 202-293-3278

Lawrence B. Taishoff, chairman
David Persson, publisher

Editorial

Donald V. West, senior vice president and editor
Mark K. Miller, managing editor
Harry A. Jessell, senior editor
Kira Greene, John S. Eggerton, assistant managing editors

Washington
Matt Stump, associate editor
Randall M. Sukow, Peter D. Lambert (technology), assistant editors
Patrick J. Sheridan, Janet Sullivan, John Gallagher, staff writers
Marsha L. Bell, editorial assistant
David R. Borucki, art director
Denise P. Smith, production

New York
630 Third Ave., 10017, 212-599-2830 Fax 212-599-2837
Geoff Foisie, chief correspondent
Stephen McClellan, chief correspondent (programming)
Lucia Cobo, radio editor (East Coast)
Rich Brown, Joe Flint, Sharon D. Moshavi, staff writers

Hollywood
1680 N. Vine St., 90028, 213-463-3148 Fax 213-463-3159
Steve Coe, assistant editor Mike Freeman, staff writer
Reed E. Bunzel, radio editor (West Coast), 408-625-3076

Advertising

New York
212-599-2830
Lawrence W. Oliver, advertising director
Joseph E. Ondrick, East Coast regional sales manager
Randi T. Schatz, sales manager
Sandy Bacchus, advertising assistant

Hollywood
213-463-3148
Nancy J. Logan, West Coast sales manager
Sandra Klausner, editorial advertising assistant

Washington
202-659-2340
Doris Kelly, sales service manager
Mitzi Miller, classified advertising manager

Advertising Representatives
Lewis Edge & Associates (Southern regional and East Coast equipment) 609-683-7900 Fax 609-497-0412
Dave Berlyn & Associates: 914-631-6468
Lindstrom Windsor & Associates: 914-234-7660 Fax 914-234-7546
Japan: (06) 925-4452 Fax (06) 925-5005

Business

Philippe E. Bouscher, vice president and controller
John M. Arena, assistant controller
Tracy Henry, systems manager
Poli F. Noyes, personnel administrator
Rhonda Moore, accounting assistant

Circulation

Kwentin K. Keenan, circulation manager

Production

Harry Stevens, production manager
Debra D. Funkhouser, production assistant

Corporate Relations

Patricia A. Vance, director
Catherine F. Friday, secretary to the chairman

The Broadcasting Yearbook

Circulation
908-665-2823
Advertising
212-599-2830

CAHNERS CONSUMER/ENTERTAINMENT PUBLISHING DIVISION
John J. Beni, senior vice president general manager
Neil Perlman, senior vice president group publisher
Lawrence B. Taishoff, adviser

CAHNERS PUBLISHING COMPANY
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Sept. 7— "How to Cover the Capitol" and "Assembly TV: The Access Debate" seminar sponsored by *Associated Press TV-Radio Association of California-Nevada*. Sacramento, Calif. Information: Rachel Ambrose, (213) 626-1200.

Sept. 8-13— "Media Criticism" seminar for broadcast and print media critics, ombudsmen, news directors and producers, sponsored by *Poynter Institute*. Poynter Institute, St. Petersburg, Fla. Information: (813) 821-9494.

Sept. 9-12— "Network 90's: Unleashing Tomorrow's Technology Today" conference and exhibition sponsored by *United States Telephone Association, Pacific Bell* and *Telecommunications*

ERRATA

In chart on football radio rights in Aug. 12 issue, **rightsholder for Cleveland Browns** should have been Malrite of Ohio (**WHK[AM]-WMMS[FM] Cleveland**), not Score Communications, which is executive producer of coverage and sells advertising time.

WGR(AM) Buffalo, N.Y., holds rights to Buffalo Bills in second year of four-year contract with team. Station will feed five preseason, 16 regular season games to regional network of 20 stations.

Co-owned **KFAN(AM)-KEEY(FM) Minneapolis will simulcast Minnesota Vikings games** this season in first year of three-year contract.

Reuters Holdings' revenue for 1990 was $2.6 billion, not $1.4 billion as reported in June 10 issue of BROADCASTING. Total earnings for 1990 were $617.8 million.

In Aug. 5 "Ratings Roundup" chart, **winner of Thursday 9:30-10 p.m.** half hour should have been Fox's **Beverly Hills 90210.**

BROADCASTING incorrectly reported in July 29 issue that Senate bill passed last June to lift telephone equipment manufacturing ban on regional Bell operating companies (**S. 173**), does not include **same cross-subsidy restrictions written into pending companion legislation in House (H.R. 1527).**

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TOP OF THE WEEK

VALUING THE BIG THREE: TELCOS GET BIGGER

Broadcasting and cable asset values fall; regulatory and legislative changes, advertising and financing all hold key to future values

BROADCASTING's survey of asset values for the three pieces of the television business shows a widened disparity between the telephone companies, the cable industry and broadcast television. Compared with a similar survey taken three years ago, the value of both broadcast television and cable is down, while the telephone companies are flat or up. The latter is now worth over three times the other two combined.

Three major issues, two of them related, have affected asset values since the last survey in 1988. Advertising is clearly in a cyclical recession and may be going through structural changes affecting broadcasters in particular. Financing, also cyclical in nature, has become more difficult to obtain. The financial illiquidity has affected broadcast television values the most, cable next and telephone companies the least.

But perhaps the major reason for the improvement of telephone asset values relative to cable or broadcasting is the feeling that they have the most to benefit from regulatory and other changes emanating from Washington. Realization of that sense would likely further widen the valuation gap.

Broadcast television

That the television side of the broadcasting industry is worth less today than several years ago would surprise hardly anyone. Yet observers might be surprised by the extent of the decline. Compared with several years ago, TV stations, TV networks and the latter side of syndicated programming are collectively valued at only about two-thirds of their value then, a loss of more than $10 billion.

In broadcast television almost all the decline in value is reflected in lower station prices, due to both lower cash flow and to the lower multiple of cash flow used to price station transactions.

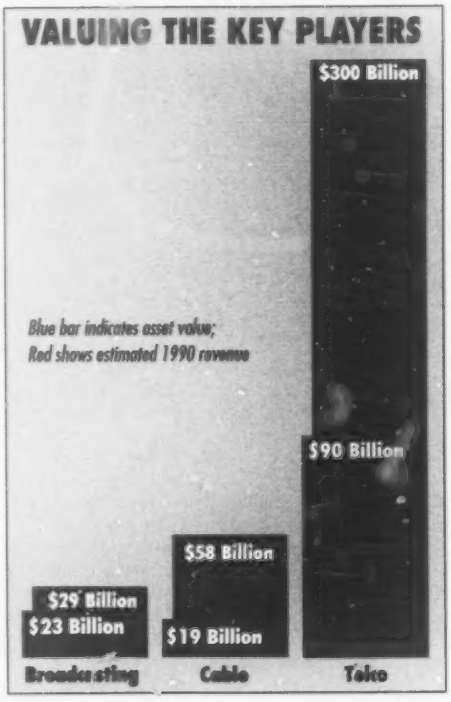
Stations in 1990 took in advertising revenue of roughly $13.3 billion. In addition, they received just over $400 million in compensation paid by ABC, CBS, NBC and Fox. The percentage of the $13.7 billion combined revenue left over after necessary operating expenses—an informal definition of cash flow margin—was down some. Estimates by Sandler Media Group covering 60 of the largest TV station groups with almost two-thirds of total industry revenue indicate a mean average cash flow margin of 39%. However, weaker margins for those stations outside the survey, many in smaller markets, bring 1990's total average down to perhaps 32%, indicating a sum total station cash flow of $4.4 billion.

Although that margin is almost the same as several years ago, the station market sensed hard times earlier this year, possibly extending into the future, and lowered to eight the multiple of cash flow used to price transactions, down from a multiple of 12 several years ago. Multiplied times the $4.4 billion, station cash flow provides an industry-wide station value, before debt, of $35.2 billion.

The collective value of networks ABC, CBS, NBC and Fox is roughly the same compared to several years ago with the emergence of the last offsetting declines by the first three. A rough guess for the total would be $3.5 billion.

Finally, barter advertising revenue, net of Fox, was estimated at roughly $1 billion last year. Dominated by studios and a few other large companies, the barter business's margin is perhaps 35%, indicating cash flow of $350 million. Estimates of multiples vary widely, but using eight provides a barter syndication value of $2.8 billion.

Broadcasting industry debt is subtracted from the total $41.5 billion value for stations, networks and syndication. According to Paul Kagan & Associates, total debt was about $17 billion, which minus the radio portion might be closer to $11 billion. A very rough estimate of TV programming debt is about $1 billion, leaving a total valuation net of debt at $29.5 billion.



Cable television

The value of the nation's cable systems could be placed anywhere between $44 billion (using a cash flow model) and $56 billion (using a per-subscriber model), which averages out to $50 billion.

Starting with an estimated $17.8 billion in system revenue in 1990 (Paul Kagan Associates) and applying a 45% profit margin would yield about $8 billion in system cash flow. Cable brokers say current valuations for systems range between 9 and 11 times cash flow. Using 10 times as an average produces a figure of $80 billion in cash flow valuation. Subtracting the $35.8 billion in debt, estimated by Kagan, puts a cash flow value on cable of $44 billion.

The valuation of cable systems on a per-subscriber basis has dropped since 1988, with $1,700 the best guess by brokers today. With 56 million cable subscribers, the $1,700 per subscriber valuation works out to just over $92 billion. Subtracting the debt leaves system valuations at $56 billion.

Few cable networks have changed ownership, but their values have held up better than cable systems. Hearst's 20% purchase of ESPN for under $200 million, translating ESPN's worth to upwards of $1 billion, is probably close to a real valuation for top programing networks.

Based on 1990 numbers, ESPN generated a cash flow margin of 21%, Turner's entertainment networks 11% (held down by Goodwill Games losses and other sports costs), MTV 25% and CNN 33%. Given that smaller networks produce smaller margins (on public record are QVC at 10% and HSN at 7%), the overall cable network average is probably closer to 20%.

With cable network revenues for 1990 projected by Veronis, Suhler at $2.1 billion, and an average cash flow margin of 20%, overall cash flow would compute to $420 million. Using a conservative 10 times cash flow valuation would put the value of basic cable networks in the $4 billion-plus range.

The pay side has been hit harder since 1988, with HBO and Showtime posting 14% and 7% operating cash flow margins, respectively, in 1990. Using the cash flow multiple would put their combined valuation at $2 billion, with Disney adding another several hundred million dollars.

All told, a valuation in the range of $8 billion can probably be put on the cable network universe.

Telephone

The telephone operating companies have not suffered the same financing problems as have cable operators and, even more so, broadcasters. Thus, the telcos, formally referred to as local exchange carriers (LEC's), appear not to have lost value; if anything, they may have gained some.

LEC operating revenue is up from several years ago, to just under $90 billion in 1990. Of that sum, just over $42.2 billion in cash flow remains after operating expenses, revealing a cash flow margin similar to that of cable.

Estimates vary as to what multiple of cash flow should be used in pricing the LEC's. Using nine times, a number suggested by Sal Muoio of Gabelli Securities, implies an asset value for the telcos of $380 billion, which, minus $50 billion of long-term debt, as of the end of 1990, leaves a net asset value of $330 billion.

Such a number may be unrealistically high because three-quarters of the total value resides in the seven regional holding companies, which, arguably, are too big to be sold or, if they were, might command a below-market multiple.

A much lower value, $275 billion, is arrived at using a dollars-per-access-line formula. The U.S. Telephone Association survey tentatively shows 138 million access lines at the end of 1990. There is no industry-wide dollar value of access lines, but $2,000 per access line might represent a conservative estimate—an offer of over $3,000 per access line was made in one of the few recent LEC transactions.

Averaging the figures using the two different valuation methods results in a total valuation for the LEC's of $300 billion. **–GF,MS**

NETWORKS FACE UNCERTAIN SCATTER MARKET

The big question facing the three networks and Fox is: How bad will the fourth-quarter scatter market be? If the current read is right, the networks and Fox may have to endure a rerun of last year's fourth-quarter scatter market when prices were off 20%-40% compared to upfront prices. Certainly, the third quarter has given no indication that relief is around the corner. Scatter prices are currently "22%-25% below 1990 upfront rates.

"If you think the upfront was soft, you ain't seen nothing yet when it comes to scatter," said one media buyer. Although it is difficult to estimate how much inventory in dollars the networks have to sell without knowing what the unit rates will be, some media buyers have valued the networks' inventory in all dayparts in the $300-million range.

ABC took the big gamble in upfront. The network wrote less upfront business and discounted less than CBS, NBC and Fox and, as a result, still has 30%-35% of its prime time inventory to sell. CBS is said to have sold upwards of 80% of its prime time inventory and NBC about 75%. Fox, like ABC, did not write as much business and probably also sold about 65% to 70% of inventory, but Fox also does not have as much inventory to sell as the other networks.

The networks and Fox are also hoping that advertisers that stayed out of the upfront may come to the table in the fourth quarter. That may not be as unrealistic a wish as it sounds. Some advertisers, media buyers said, held back on upfront spending in hopes of an opportunistic scatter market despite the appealing network upfront discounts. A few media buyers also argue that the prices for scatter in the fourth quarter cannot—whether the economy turns around or not—dip much lower than upfront rates.

"If there will be a quarter that will be priced closer to parity with the [1991] upfront, it will be the fourth quarter," said Steve Grubbs, senior vice president, BBDO, adding that "the networks sold [roughly] the same amount of inventory in the upfront at lowered costs. If scatter is as weak as last year, even then the discounts will not be as deep." Also, the networks could again pull dollars out of cable, syndication and spot budgets if their pricing is comparable.

It will be at least another month until it is possible to guess who had the best upfront selling strategy. ABC is clearly taking a risk that the economy will turn around or that advertisers will have money to spend in the fourth quarter. Jake Keever, executive vice president, sales, ABC, said he has seen "several budgets coming in larger than last year, in the fourth quarter."

Opinions are mixed on first-quarter 1992. No official read will likely be available until mid-November, when advertisers decide whether to exercise their options on upfront buys made in June.

For the first time in recent history, many syndicators will also be participating in the scatter market. Most of the sellers of syndicated programing like to leave little, if any, inventory for the scatter market. However, this year, even the syndicators of top programing were only able to sell, according to industry estimates, about 75% of their inventory. If the network scatter market resembles last year's fourth quarter, the syndicators will most likely feel the pinch. Said one syndication executive: "If you can buy network at $5 per household and the syndicators sell it at $3.50, the advertiser may not care. Network is so efficient, it does not matter what price you are selling [syndication] at. If network pricing is comparable, no one wants it." **–JF**

WESTWOOD, SHERIDAN POST GAINS IN RADAR 43

Just-released RADAR 43 results show that network radio reaches 72% of persons aged 12 and over in the U.S. (147 million people, on a projected basis). Compared to RADAR 42, which was released last February (RADAR results are released twice a year), the audiences for all networks measured by RADAR increased 4.9%. RADAR 43 represents the second report reflecting all the changes in network radio over the last 24 months (BROADCASTING, Feb. 25). With the new makeup in place, the networks continue to show the strength in numbers they were hoping to achieve. Westwood One's networks posted the biggest audience gains, and ABC's Paul Harvey continued to dominate the list of top 10 network radio shows, with ABC recording a clean sweep with all 10, and 19 of the top 20.

ABC's Prime network ranks first in the report in average quarter-hour share, Monday-Sunday, 6 a.m. to 7 p.m., network audiences to all commercials, persons aged 12-plus, 18-plus and adults 25-54. Westwood/Mutual again ranked second overall in the same three categories; third place in all three categories belongs to ABC's Platinum.

Westwood One's Source posted increases of 31.1%, 32.1% and 29.1% in the three demographic categories, persons 12-plus, adults 18-plus and adults 25-54, respectively. Sheridan Broadcasting, the second biggest gainer, posted increases of 15.2% (persons 12-plus), 15.8% (adults 18-plus) and 16.7% (adults 25-54). Out of 16 radio networks in RADAR 43, only three declined: Unistar's Power (decreased 0.9%); ABC's Excel (3.2%) and National Black Network (5.5%).

CBS Spectrum Radio maintained its number-five rank in all three categories, posting slight increases of 0.7% (12-plus), 2.0% (18-plus) and 2.8% (adults 25-54). CBS Radio Network also retained its overall rank of ninth in all three categories.

The breakout for average quarter-hour numbers by network, Monday-Sunday, 6 a.m. to 7 p.m., adults aged 18 and older, was: ABC Prime, 5,165,000 listeners; Westwood/Mutual, 3,297,000; ABC Platinum, 2,696,000; Unistar Super, 2,283,000; CBS Spectrum, 2,268,000; Unistar Ultimate, 2,117,000; ABC Genesis, 2,029,000; W.O.N.E., 1,853,000; CBS Radio Network, 1,704,000; Westwood/NBC, 1,483,000; Westwood/Source, 1,445,000; Unistar Power, 1,137,000; ABC Excel, 1,081,000; ABC Galaxy, 952,000; Sheridan, 389,000, and National Black Network, 274,000.

Unistar's Ultimate network posted the biggest gains for the company, increasing listeners by 7.2% in the adults 25-54 demographic. Super and Power showed gains of 1.2% and 1.5%, respectively, in the same category. In the 12-plus category, Ultimate increased by 3.3%, Super by 1.7% and Power showed a slight decrease of 0.9%. In the adults 18-plus category, Super increased by 1.8%, Ultimate by 2.5% and Power 0.3%.

National Black Network posted the biggest losses in all three categories, declining 5.5% (12-plus), 6.8% (18-plus) and 10.5% (adults 25-54).

The top five positions for news personalities in network radio, total persons aged 12 and older, average audience, went to Paul Harvey: news, Monday-Friday (M-F), 8:30 a.m., 6,243,000 listeners; news, M-F, 12:06 p.m., 4,640,000; *The Rest of the Story*, Saturday, 8:30 a.m., 3,705,000; news, Saturday, 11:10 a.m., 2,998,000, and *The Rest of the Story*, M-F, 3:06 p.m., 2,922,000.

CBS's *Osgood File* ranked in the top 20; all other slots belonged to ABC. *Osgood* came in 20th, M-F, 7:25 a.m., 2,307,000 listeners.

There were few surprises in the top 20 network radio programs, network audiences to commercials, within programs, persons aged 12-plus. The top 10 breakdown was: *Paul Harvey News and Comment*, M-F, 8:30 a.m., 6,243,000; *Paul Harvey News and Comment*, M-F, 12:06, 4,640,000; *ABC Prime News*, M-F, 7 a.m., 3,913,000; *Paul Harvey's The Rest of the Story*, Saturday, 8:30 a.m., 3,705,000; *ABC Prime News*, M-F, 8 a.m., 3,675,000; *Paul Harvey News and Comment*, Saturday, 11:10 a.m., 2,998,000; *ABC Platinum News/Music*, M-F, 8 a.m., 2,952,000; *Paul Harvey's The Rest of the Story*, M-F, 3:06 p.m., 2,922,000; *ABC Prime News*, M-F, 9 a.m., 2,884,000, and *ABC Prime News*, M-F, 6 a.m., 2,792,000.

Programs ranked 11-20 were broken down as follows: *ABC Prime News*, Saturday, 8 a.m., 2,661,000; *ABC Platinum News/Music*, M-F, 10 a.m., 2,653,000; *ABC Prime News*, M-F, 10 a.m., 2,644,000; *ABC Platinum News/Music*, M-F, 9 a.m., 2,629,000; *ABC Prime News*, Saturday, 9 a.m., 2,471,000; *ABC Prime News*, Saturday, 7 a.m., 2,423,000; *ABC Platinum News/Music*, M-F, 10:30 a.m., 2,417,000; *ABC Prime News*, M-F, 11 a.m., 2,409,000, and *ABC Prime News*, Saturday, 10 a.m., 2,328,000 listeners.

This information was provided by ABC Radio Networks, CBS Radio Networks and Westwood One. Also measured by RADAR are Unistar, National Black Network and Sheridan. RADAR results are delivered by New Jersey-based Statistical Research Inc. -30-

RADAR 43—SPRING 1991

Volume 2, network audiences to all commercials

Average quarter-hour summary by network, Mon.-Sun. 6 a.m.-7 p.m.

Network	Total persons 12+	Rank
ABC Prime	5,258,000	1
Westwood/Mutual	3,380,000	2
ABC Platinum	2,800,000	3
ABC Genesis	2,475,000	4
CBS Spectrum	2,361,000	5
Unistar Super	2,346,000	6
Unistar Ultimate	2,183,000	7
W.O.N.E.	1,894,000	8
CBS Radio Net.	1,721,000	9
Westwood/Source	1,613,000	10
Westwood/NBC	1,524,000	11
Unistar Power	1,254,000	12
ABC Excel	1,213,000	13
ABC Galaxy	1,024,000	14
Sheridan	424,000	15
National Black	292,000	16

Network	Adults 25-54	Rank
ABC Prime	2,993,000	1
Westwood/Mutual	1,847,000	2
ABC Platinum	1,475,000	3
ABC Genesis	1,348,000	4
CBS Spectrum	1,326,000	5
Unistar Super	1,313,000	6
Unistar Ultimate	1,251,000	7
W.O.N.E.	1,051,000	8
Westwood/Source	958,000	9
Unistar Power	822,000	10
CBS Radio Net.	821,000	11
Westwood/NBC	806,000	12
ABC Excel	774,000	13
ABC Galaxy	532,000	14
Sheridan	237,000	15
National Black	171,000	16

RATINGS ROUNDUP

		7:00 PM	7:30 PM	8:00 PM	8:30 PM	9:00 PM	9:30 PM	10:00 PM	10:30 PM
MONDAY 8/5	ABC 8.7 / 16			NFL Pre-Season Football—Buffalo vs. NY Giants (49) [8.7 / 16] 7.3 / 15		8.0 / 15	9.3 / 17	8.9 / 15	9.6 / 17	9.6 / 17
	CBS 12.0 / 22			Evening Shade (33) 9.8 / 19	Major Dad (23) 10.4 / 19		Murphy Brown (6) 12.6 / 22	Designing Wmn. (3) 13.5 / 23	Northern Exposure (4) [12.8 / 23] 13.1 / 23	12.4 / 23
	NBC 9.2 / 17			Fresh Prince (34) 9.6 / 19	A Different World (36) 9.5 / 18		NBC Monday Night Movie—Rage of Angels Pt. 2 (43) [9.0 / 16] 8.5 / 15	8.6 / 14	9.1 / 16	9.6 / 18
	FOX 5.8 / 10			Fox Night at the Movies—The Sure Thing (74) [5.8 / 10] 5.0 / 10		5.7 / 11	6.1 / 11	6.5 / 11		
TUESDAY	ABC 8.7 / 16			Who's the Boss (44) 8.9 / 18	Cocoanut Downs (58) 7.5 / 14		Roseanne (8) 12.2 / 22	Coach (21) 10.7 / 18	Thirtysomething (69) [6.3 / 12] 6.2 / 11	6.3 / 12
	CBS 10.6 / 20			Rescue: 911 (31) [9.9 / 19] 9.2 / 18		10.6 / 20	CBS Tuesday Night Movie—Beverly Hills Cop 2 (16) [11.0 / 20] 8.6 / 15	10.0/ 17	12.7 / 23	12.7 / 24
	NBC 10.1 / 19			Matlock (29) [10.2 / 20] 9.7 / 19		10.7 / 20	Heat of the Night (12) [11.1 / 19] 10.8 / 19	11.3 / 19	Law and Order (42) [9.1 / 17] 9.4 / 17	8.8 / 17
WEDNESDAY 8/7	ABC 8.8 / 17			Wonder Years (41) 9.2 / 19	Growing Pains (25) 10.3 / 20		Doogie H. M.D. (25) 10.3 / 19	Davis Rules (36) 9.5 / 17	Anything B. Love (63) 6.9 / 13	Married People (67) 6.5 / 13
	CBS 8.4 / 16			Police Squad! (69) 6.3 / 13	Morton & Hayes (85) 4.5 / 9		Jake and the Fatman (44) [8.9 / 16] 8.2 / 15	9.7 / 17	48 Hours (20) [10.9 / 20] 10.9 / 20	10.8 / 21
	NBC 9.8 / 18			Unsolved Mysteries (7) [12.4 / 25] 11.4 / 23		13.3 / 25	Night Court (34) 9.6 / 17	Seinfeld (51) 8.5 / 15	Quantum Leap (56) [7.9/ 15] 7.7 / 14	8.0 / 15
THURSDAY 8/8	ABC 8.1 / 15			Gabriel's Fire (73) [5.9 / 12] 5.9 / 12		5.8 / 11	Father Dowling (64) [6.8 / 12] 6.4 / 11	7.2 / 12	Primetime Live (11) [11.6 / 21] 11.3 / 20	12.0 / 23
	CBS 7.8 / 14			Top Cops (44) [8.9 / 18] 8.3 / 17		9.4 / 18	Trials of Rosie O'Neill (67) [6.5 / 11] 6.4 / 11	6.5 / 11	S. King's Golden Years (55) [8.0 / 15] 8.1 / 14	7.9 / 15
	NBC 10.5 / 20			Cosby (30) 10.0 / 20	A Different World (16) 11.0 / 21		Cheers (2) 13.9 / 25	Wings (12) 11.1 / 19	L.A. Law (50) [8.6 / 16] 8.6 / 15	8.6 / 16
	FOX 9.7 / 18			Simpsons (39) 9.4 / 19	True Colors (60) 7.2 / 14		Beverly Hills 90210 (12) [11.1 / 19] 10.4 / 18	11.7 / 20		
FRIDAY 8/9	ABC 10.7 / 22			Full House (16) 11.0 / 20	Family Matters (10) 11.7 /24		Perfect Strang. (25) 10.3/21	Hi Honey I'm Home (44) 8.9 / 18	20/20 (16) [11.0 / 22] 11.0 / 22	11.0 / 23
	CBS 7.8 / 16			Fantastic Facts (52) 8.4 / 18	Primetime Pets (64) 6.8 / 14		CBS Friday Night Movie—Pair of Aces (56) [7.9 / 16] 7.2 / 15	7.7 / 15	8.3 / 16	8.6 / 18
	NBC 6.1 / 13			NBC Movie of the Week—Joshua's Heart (69) [6.3 / 13] 5.2 / 11		5.8 / 12	6.9 / 14	7.4 / 15	Hunter (74) [5.8 / 12] 6.0 / 12	5.6/ 12
	FOX 5.1 / 11			America's Most Wanted (78) [5.3 / 11] 4.8 / 10		5.9 / 12	Marilyn:Something-Give (82) [4.8 / 10] 4.6 / 9	4.9 / 10		
SATURDAY 8/10	ABC 6.5 / 14			Young Riders (82) [4.8 / 11] 4.5 / 11		5.1 / 11	ABC Saturday Night Movie—Perfect People (59) [7.4 / 16] 5.8 / 12	7.1 / 15	8.3 / 17	8.5 / 18
	CBS 4.7 / 10			Claws (91) 3.4 / 8	Vidiots (93) 2.6 / 6		NFL Pre-Season Football—NY Giants vs. Cleveland Browns (76) [5.7 / 13] 4.5 / 10	5.3 / 11	6.1 / 13	6.4 / 14
	NBC 8.4 / 18			Golden Girls (52) 8.4 / 20	Golden Girls (39) Special 9.4 / 21		Empty Nest (21) 10.7 / 23	Dear John (52) 8.4 / 18	Sisters (66) [6.7 / 14] 6.7 / 14	6.8 / 15
	FOX 5.5 / 12			Cops (72) 6.1 / 14	Cops 2 (62) 7.0 / 16		Totally Hdn. Video (82) 4.8 / 10	Babes (88) 3.9 / 8		
SUNDAY 8/11	ABC 10.2 / 19	Life Goes On (81) [5.1 / 11] 4.5 / 10	5.7 / 12	Am. Fun. Videos (31) 9.9 / 20	Am. Fun. People (23) 10.4 / 20		ABC Sunday Night Movie—Commando (4) [12.8 / 22] 11.4 / 20	12.7 / 22	14.0 / 24	13.4 / 24
	CBS 12.2 / 23	60 Minutes (1) [16.1 / 36] 15.0 / 34	17.1 / 37	Murder, She Wrote (9) [12.1 / 24] 11.8 / 24		12.5 / 24	CBS Sunday Night Movie—The Stranger Within (25) [10.3 / 18] 10.1 / 18	10.1 / 17	10.3 / 18	10.5 / 19
	NBC 7.5 / 14	Ferris Bueller 3.5 / 8	Parent-hood 2.7/ 6	Expose (86) 4.3 / 9	Real Life (78) J. Pauley 5.3 / 10		NBC Sunday Night Movie—P. Mason: Case All-Star Assassin (12) [11.1 / 19] 10.2 / 18	11.1 / 19	11.6 / 20	11.6 / 21
	FOX 6.2 / 12	Total. Hid (89) Video 3.5 / 8	Parker (87) Lewis 4.2 / 9	In Living Color (61) 7.1 / 14	Get A Life (78) 5.3 / 10		Married w/ Children (44) 8.9 / 16	Married w/ Children (36) 9.5 / 16	Sunday Comics (77) [5.6 / 10] 5.7 / 10	5.5 / 10

WEEKLY PRIME TIME AVERAGE	ABC 8.9 / 17	CBS 9.2 / 18	NBC 8.7 / 17	FOX 6.4 / 12
SEASON PRIME TIME AVERAGE	ABC 11.4 / 20	CBS 11.4 / 20	NBC 11.6 / 20	FOX 6.2 / 11

YELLOW = 1/2 HR WINNER

*—PREMIERE

NIGHTLY RATING / SHARE (##)—RANKING [##]—PROGRAM RATING / SHARE HALF-HOUR RATING / SHARE SOURCE: A.C. NIELSEN

ABC CUTS TV AFFILIATE COMPENSATION

Reduction estimated at $11 million; future hourly rate to be determined by formula based on household delivery; affiliates protest

ABC announced several compensation changes last week that together could reduce the total amount given annually to affiliates by roughly $11 million, or 10% of the current $110 million total. The move was surprising, since ABC's prior restraint in cutting compensation had been rewarded with fewer prime time schedule preemptions, which are down 38% since 1988. The announcement drew an immediate negative response from the ABC Television Affiliates Association.

Most of the dollar reduction would come from cutting the hourly rate percentage applicable to *World News Tonight*. The current compensation rate, which averages close to 25% of the hourly rate, will be cut to 10%, closer to the 10% and 15% rates of the other two networks, said ABC affiliate relations executive vice president George Newi. To adjust for the fact that stations in the mountain and central time zones will lose less—they currently have a lower compensation rate for the newscast—they will also lose two percentage points from their prime time rate.

From the point of view of the affiliates, however, the worst change may be ABC's decision to tie each station's hourly rate to its delivery of prime time households, a formula similar to that adopted earlier by NBC. Peter Desnoes, chairman of the ABC affiliates association, said the new formula is unfair because ABC has not lost revenue despite declining household delivery. The formula, said Desnoes, effectively locks at 1991 levels the value to affiliates of a TV household: "If ABC were to an-

SECOND-QUARTER EARNINGS-PROFITS REPORT FOR TV AD CATEGORIES

Category	% Chg. Revenue	% Chg. Profit	% of total 1990 network advertising	% of total 1990 spot* advertising
Airlines	7%	-97%	0.9%	2.4%
Automotive	-10%	loss	17.3%	25.3%
Banks, S&Ls	-7%	loss	.09%	3.1%
Beverages	7%	9%	4.6%	7.2%
Financial Services	8%	25%	0.5%	0.4%
Insurance	3%	15%	1.7%	2.1%
Hotels & Motels	9%	2%	0.3%	2.2%
Office Equipment	loss	1.4%	0.3%	
Retail	9%	27%	2.4%	5.0%
Restaurants	2%	5%	6.1%	14.5%

* National, regional and local. Source for category revenue and profit: *Business Week*. Source for advertising percentages: Arbitron's Broadcast Advertiser Reports and Television Bureau of Advertising (TVB).

The second-quarter revenue and profit picture for some of television's major advertising categories was mixed, and although some areas were up compared to a year ago, not all analysts that follow those industries are sure that positive reports translate into bigger advertising budgets. In fact, few are expecting advertising increases for most of the categories shown above.

The automotive category, which in 1990 accounted for 17% of all network advertising and 25% of local spot advertising, is still feeling the sting of the recession, as second-quarter totals indicate. Joseph Phillippi, analyst, Shearson Lehman Hutton, said he "suspects that advertising budgets are down" at Chrysler, General Motors and Ford. General Motors and Chrysler have both done large cross-media packages and are, Phillippi said, spending smarter. "Clearly this [advertising] is an area where the bean counters look and ask where they can spend less and get almost as much bang for the buck."

How consolidation in the airline business will impact advertising remains to be seen, but in 1970 promotion/advertising costs for U.S. airlines were 2.7% of all operating costs, and through the second quarter of 1991 that declined to 2.4%, according to the Air Transport Association of America. Kidder, Peabody analyst Samuel Buttrick said Delta's acquisition of Pan-Am's shuttle and several international routes may require extra advertising to "educate the consumer on the transition process." However, when it comes to advertising special rates or discounts, it is print that sees an increase, not TV, he said.

Although travel and tourism have been off in several states, revenue and profit were up for hotels and motels. Once again, that may not translate into more advertising dollars. "Travel," said Merrill Lynch analyst Harold Vogel, "has been rather weak, and it seems to me that these companies will try to sustain ad budgets. It is unlikely to become much more aggressive." Fortunately for broadcasters, hotel and motel advertising accounted for less than 1% of all network advertising and only 2.2% of spot and local advertising in 1990.

Beverage companies spent a little more on TV, and a combination of beer and soft-drink companies reported single-digit growth for second-quarter 1991. In 1990, beverage advertising accounted for 4.6% of all network advertising and 7.2% of national and local spot advertising. Brown Brothers Harriman analyst Jay Nelson does not expect those numbers to increase much this year: "Both Coke and Pepsi have raised the noise level pretty high, but it has slowed." As for beer, Nelson said smaller breweries have been reducing spending, and while beer advertising remains heavy, concern over commercial regulation may check growth revenue, at least for now. -JF

CHANGING HANDS

This week's tabulation of station and system sales ($250,000 and above)

KVSO(AM)-KKAJ(FM) Ardmore, Okla. □ Sold by Sunburst Broadcasting Inc. to Carter County Broadcasting Inc. for $1,276,592 in assumption of debt. **Seller** is headed by Patrick J. Nugent, who is 80% shareholder in Nugent Broadcasting, licensee of KCTI(AM) Gonzales, Tex., and 75% shareholder of Gonzales Broadcasting, licensee of KPJN(FM) Gonzales. **Buyer**'s stock is 100% owned by First National Bank of Yorktown, Tex. Principals Lou Evans Gips, David P. Styra and Robert B. Eyhorn Jr. are chairman, vice president and director, respectively, of bank. Family Financial Institution Inc., 86% shareholder of First National Bank of Yorktown, through trusts owns interests in LBJ Co., licensee of KLBJ-AM-FM Austin, Tex. KVSO is fulltimer with oldies format on 1240 khz and 1 kw. KKAJ has country format on 95.7 mhz with 100 kw and antenna 450 feet above average terrain.

KRVV-FM Bastrop (Monroe), La. □ Sold by My Cue Broadcasting Inc. to Holladay Broadcasting of Louisiana Inc. for $1,035,891. Terms: $40,000 cash at closing, $10,000 earnest money deposit, $735,891 in assumption of debt and $250,000 noninterest-bearing note. **Seller** is headed by Billy Edmundson and is also licensee of KMYQ(AM) Bastrop, La. **Buyer** is headed by Clay E. Holladay, and is 100% owner of Holladay Broadcasting Co. Inc., licensee of WYZB(FM) Mary Esther, Fla. KRVV-FM has adult, classic rock format on 100.1 mhz with 50 kw and antenna 150 feet above average terrain.

KBCM(FM) Yankton, S.D. □ Sold by Flagship Communications Ltd. to Park Broadcasting of the Midwest for $675,000. KBCM(FM) will form combo with Park's WNAX(AM) Yankton. **Seller** is headed by Bob Barron and has interest in KSCJ(AM) Sioux City, Iowa. **Buyer** is subsidiary of Park Communications, which is headed by Roy H. Park. Park Communications has interest in WBMG(TV) Birmingham, Ala.; KWLO(AM)-KFMW(FM) Waterloo, Iowa; KJJO-AM-FM St. Louis Park, Minn.; WPAT-AM-FM Paterson, N.J.; WHEN(AM)-WRHP(FM) Syracuse and WUTR(TV) Utica, both New York; WNCT-AM-FM-TV Greenville, N.C.; KWJJ-AM-FM Portland, Ore.; WDEF-AM-FM-TV Chattanooga and WJHL-TV Johnson City, both Tennessee; WTVR-AM-FM-TV Richmond and WSLS-TV Roanoke, both Virginia, and KEZX-AM-FM Seattle. KBCM(FM) has country format on 104.1 mhz with 100 kw and antenna 430 feet above average terrain. *Broker: Jorgenson, Chapin & Co.*

KSUX(FM) Winnebago, Neb. (Sioux City, Iowa) □ Sold by Gary L. Violet to Flagship Communications for $450,000. KSUX(FM) will form combo with Flagship's KSCJ(AM) Sioux City. **Seller** recently sold his interest in KSPG(AM)-KBUZ(FM) El Dorado, Kan., for $1.05 million to New Life Fellowship Inc. ("Changing Hands," Aug. 5). Violet is applicant for new FM at Clearwater, Kan. **Buyer** is headed by Bob Barron and is selling KBCM(FM) Yankton, S.D. (see above). KSUX(FM) has country format on 105.7 mhz with 1.4 kw and antenna 1,568 feet above average terrain. *Broker: Jorgenson, Chapin & Co.*

WWOC(FM) Avalon, N.J. □ Sold by Group Six Communications Inc. to Ocean Media Inc. for $400,000, including $50,000 three-year noncompete covenant. **Seller** is headed by Lawrence P. Herbster. Ronald Townsend, principal of Group Six Communications, is vice president of Gannett Co. Inc.'s subsidiary's licensees of eight TV's in top 60 markets. **Buyer** is headed by Sid Friedman, who is employed as director of International Electronic Journalism, NBC News. Friedman also has interests in licensee of WDMV(AM) Pocomoke City, Md., and is 20% shareholder of Webb Broadcasting Inc., applicant for new FM in Ocean City, Md. WWOC has easy-listening format on 94.3 mhz with 3 kw and antenna 300 feet above average terrain.

WGEC(FM) Springfield (Savannah), Ga. □ Sold by Christian Enterprises Inc. to Country Time Broadcasting for $390,000. Terms: $110,000 cash at closing, $25,000

PROPOSED STATION TRADES

By volume and number of sales

Last Week:

AM's □ **$330,000** □ **4**
FM's □ **$3,405,891** □ **9**
AM-FM's □ **$1,276,592** □ **1**
TV's □ **$0** □ **0**
Total □ **$4,012,483** □ **14**

Year to Date:

AM's □ **$57,103,480** □ **176**
FM's □ **$139,305,646** □ **170**
AM-FM's □ **$159,299,179** □ **119**
TV's □ **$730,299,000** □ **53**
Total □ **$1,085,007,305** □ **518**

For 1990 total see Jan. 7, 1991 BROADCASTING.

CLOSED!

The sale of **WVGO-FM,** Richmond, Virginia by **Daytona Group of Virginia,** Norman S. Drubner, Principal to **Benchmark Communications,** Joe Mathias, Phillip Rainwater and Bruce Spector, Partners for **$4,000,000.**

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of WWOR-TV. (MM docket 88-382 by ID on Remand [FCC 91D-34] adopted July 3 by ALJ Richard L. Sippel.)

■ **Bay Shore, NY** Upheld grant of Shore Media Inc.'s application for new FM on channel 276 and dismissed petition for review and denied petition for reconsideration filed by Long Island Music Broadcasting Corporation (LIMBC). (MM docket 87-246, Report No. MM-558, Mass Media Action, July 12 by MO&O [FCC 91-219].)

■ **Shirley, Ridge and Southampton, all New York** Designated for hearing mutually exclusive applications of Sacred Heart University Inc., Long Island Educational TV Council Inc. and Long Island University for new noncommercial educational facilities at Shirley and Ridge, respectively, and for modification of WPBX(FM) at Southampton. (MM docket 91-206 by Order [DA 91-834] adopted June 28 by Chief, Audio Services Division, Mass Media Bureau.)

■ **Yadkinville and Greensboro, both North Carolina** Dismissed Triad Network, Inc.'s appeal of Memorandum Opinion and Order released June 19, which found Triad's counsel in conflict of interest in this proceeding concerning application of Palmetto Communications Company for construction permit to modify facilities of WDIX(AM) Yadkinville and Triad's application for new AM in Greensboro. (MM docket 89-357 by MO&O [FCC 91R-62] adopted July 8 by Review Board.)

■ **Cleveland** Upheld Bureau's action approving transfer of control of WKYC-TV from NBC to Multimedia Inc. over objections of AFTRA and NABET. (MM-565, Mass Media Action, by Commission July 30 by MO&O [FCC 91-242].)

■ **Huron, OH** FCC has overturned Review Board order remanding to ALJ proceeding involving five mutually exclusive applications for new FM on channel 241A. It also vacated an order by ALJ dismissing application of Luipold Broadcasting, Inc. (MM docket 88-86 by MO&O [FCC 91-198] adopted July 2 by Commission.)

■ **Hormigueros, PR** Dismissed with prejudice applications of Joseph Bahr, Guillermo A. Bonet, and Occidental Broadcasting Corporation and granted application of Renacer Broadcasters Corporation for new FM on channel 291A in Hormigueros. (MM docket 89-541 by ID [FCC 91D-40] adopted July 16 by ALJ Edward Luton.)

■ **Hanahan, Sumter and Wedgefield, all South Carolina** Renewed, over objections of various entities, licenses for stations WDXY(AM) Sumter and WIBZ(FM) Wedgefield were renewed unconditionally; and license of WAVF(FM) Hanahan was renewed for short-term and subject to reporting conditions. Additionally, WAVF was issued notice of apparent liability (NAL) for forfeiture of $13,000 for its repeated failures to comply with Commission's EEO provisions. (By MO&O and NAL [FCC 91-218] adopted July 11.)

■ **Kingstree, SC** Upheld initial decision concluding that Williamsburg County Broadcasting Corp. is unqualified to remain licensee of WKSP(AM) and ordering license to be revoked. (MM docket 88-536, Report No. DC-1930, by Commission August 1 by MO&O [FCC 91-255].)

■ **Rapid City, SD** Denied petition to rescind or revoke filed by Spitzer Communications Co. against substitution of channel 281C1 for channel 282C and modification of construction permit for Tom-Tom Communications Inc. in Rapid City. (MM docket 88-540 by MO&O [DA 91-886] adopted July 9 by Chief, Mass Media Bureau.)

■ **Killington, VT** Approved settlement agreement and dismissed with prejudice applications of Albert E. Gary, Mountain Broadcasting Limited Partners, and Elf Broadcasting Company; granted application of Killington Broadcasters Ltd. for construction permit for new FM on channel 287C2 at Killington. (MM docket 88-240 by SD [FCC 91D-36] adopted July 9 by ALJ Richard L. Sippel.)

■ **Crewe, VA** Ordered Southern Virginia Broadcasting Corp., former licensee of stations WSVS-AM-FM to forfeit $15,000 for repeated failures to comply with Commission's affirmative action provisions. (MM-562, July 12 by MO&O [FCC 91-221].)

■ **Richmond, VA** Upheld Review Board decision granting application of James River Communications Corporation for new FM on channel 266A. Weyburn Broadcasting Limited Partnership, Future Broadcast Limited Partnership, Virginia Commonwealth Limited Partnership and Witjo Broadcasting Inc. sought review of that decision. Commission also dismissed James River's conditional application for review of Board's decision. (MM docket 87-352, Report No. DC-1910, July 15 by Order [FCC 91-222].)

■ **Roanoke, VA** Resolved comparative issue in favor of Susan D. Brown and granted Brown's application for new FM on channel 287A, and denied competing application of Pamela R. Jones. (MM docket 90-295 by Summary Decision [FCC 91D-39] issued July 12 by ALJ Richard L. Sippel.)

ALLOCATIONS

■ **Gosnell, et al., AR, and Germantown, et al., TN** Effective September 9, allotment of channel 297A to Osceola, AR, as community's second local FM transmission service; filing window: September 9-October 9. (MM docket 87-619 by MO&O [DA-91-920] adopted July 22 by Assistant Chief, Policy and Rules Division, Mass Media Bureau.)

■ **Edgewater, FL** Effective September 9, substitution of channel 226C3 for channel 226A and conditional modification of de Horo Radio Ltd.'s construction permit, accordingly. (MM docket 91-117 by R&O [DA 91-918] adopted July 17 by Chief, Allocations Branch, Policy and Rules Division, Mass Media Bureau.)

■ **West Palm Beach, FL** Effective September 9, substitution of channel 221C3 for channel 221A and conditional modification of license for WNGS(FM) accordingly. (MM docket 91-74 by R&O [DA 91-914] adopted July 11 by Chief, Allocations Branch, Policy and Rules Division.)

■ **Newton, IL** Effective September 9, substitution of channel 278B1 for channel 278A and conditional modification of construction permit for WIKK(FM) accordingly. (MM docket 91-123 by R&O [DA 91-916] adopted July 17 by Chief, Allocations Branch, Policy and Rules Division.)

■ **Eagle Grove, IA** Effective September 5, allotment of channel 264C3 as community's first local FM service; filing window: September 6-October 7. (MM docket 91-4 by R&O [DA 91-883] adopted July 9 by Chief, Allocations Branch, Policy and Rules Division.)

■ **Eldon, IA** Effective September 9, allotment of channel 282C3 as community's first local FM service; filing

SUMMARY OF BROADCASTING & CABLE

BROADCASTING

SERVICE	ON AIR	CP's [‡]	TOTAL [*]
Commercial AM	4,988	239	5,227
Commercial FM	4,470	984	5,454
Educational FM	1,466	294	1,760
Total Radio	**10,924**	**1,517**	**12,441**
Commercial VHF TV	555	18	573
Commercial UHF TV	569	171	740
Educational VHF TV	124	3	127
Educational UHF TV	231	12	243
■ Total TV	**1,479**	**204**	**1,683**
VHF LPTV	206	163	369
UHF LPTV	689	863	1,552
■ Total LPTV	**895**	**1,026**	**1,921**
FM translators	1,861	350	2,211
VHF translators	2,706	83	2,789
UHF translators	2,318	326	2,644

CABLE

Total subscribers	53,900,000
Homes passed	71,300,000
Total systems	10,823
Household penetration†	58.6%
Pay cable penetration	29.2%

* Includes off-air licenses. † Penetration percentages are of TV household universe of 92.1 million. ‡ Construction permit. ‖ Instructional TV fixed service. ¶ Studio-transmitter link. Source: Nielsen and Broadcasting's own research.